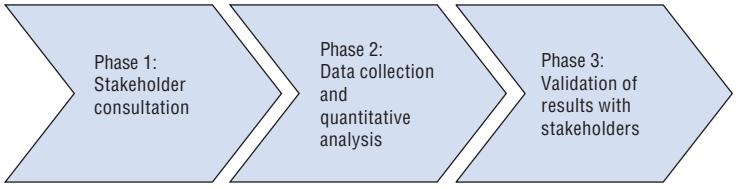
PART I

Approach and Methodology

1. Sector identification: the Sector Prioritisation Framework (SPF)

The identification of the sectors covered by the project "Defining and Strengthening Sector Specific Sources of Competitiveness" (the SSSC project) was carried out based on the Sector Prioritisation Framework (SPF) methodology. This approach is based on a three-step process involving stakeholder consultation; data collection and quantitative analysis; and validation of results with key stakeholders (Figure 1).

Figure 0.1. **Sector Prioritisation Framework**



1.1. Phase 1: Stakeholder consultation

Investment Promotion Agencies were asked to provide a list of sectors that they actively promote in their countries. The list of sectors collected was then cross-checked against investment strategies and information available in government reports and on websites. Using the list of priority sectors throughout the Western Balkans, an initial short list of sectors to consider for the analysis was created.

Suggestions and comments concerning the selection of sectors and the methodology were elicited from other organisations, including the World Bank/FIAS Invest in the Western Balkans programme (IIWB), the European Bank for Reconstruction and Development (EBRD) and the Vienna Institute for International Economic Studies (wiiw).

1.2. Phase 2: Data collection and quantitative analysis

After consultation with government representatives, international organisations and regional and industry experts, the OECD performed a quantitative analysis of the current situation and growth potential of several sectors in the Western Balkans. This evaluation allows sectors to be positioned relative to each other in two main dimensions: market attractiveness (which incorporates the competitive advantage and potential growth of a sector in a country) and country benefits.

These two dimensions are broken down into a number of variables:

1. *Market attractiveness:* market growth of the sector; share of the sector's value-added in total value-added; compound annual growth rate (CAGR) of value-added over a number of years; share of the sector's exports in total exports; trade balance of the sector; share of the number of firms active in the sector in the total number of firms present in the country; CAGR of the number of firms active in the sector over a number of years.

2. *Country benefits:* share of the sector's FDI stock in total FDI stock; CAGR of FDI stock in the sector over a number of years; share of employment in the sector in total employment; CAGR of employment in the sector in total employment; innovation.

The SPF covers 23 sectors.[1] To facilitate data collection, the SPF sectors correspond to the NACE classification of economic activities.[2]

Data was collected from the following sources: national offices of statistics (value-added, number of firms, employment); UNIDO (exports and trade balance); National Central Banks and the Vienna Institute for International Economics (FDI flows and stocks); and the EU Innovation Scoreboard (innovation).

Both dimensions were scored on a scale of 0 (low benefits or attractiveness) to 100 (high benefits or attractiveness). To determine the score, each variable within the dimension was allocated a weight, based on a correlation with FDI inflows at industry level, and validated through a comprehensive literature review. The outcome of the analysis and the resulting weights can be found in Annex 1.

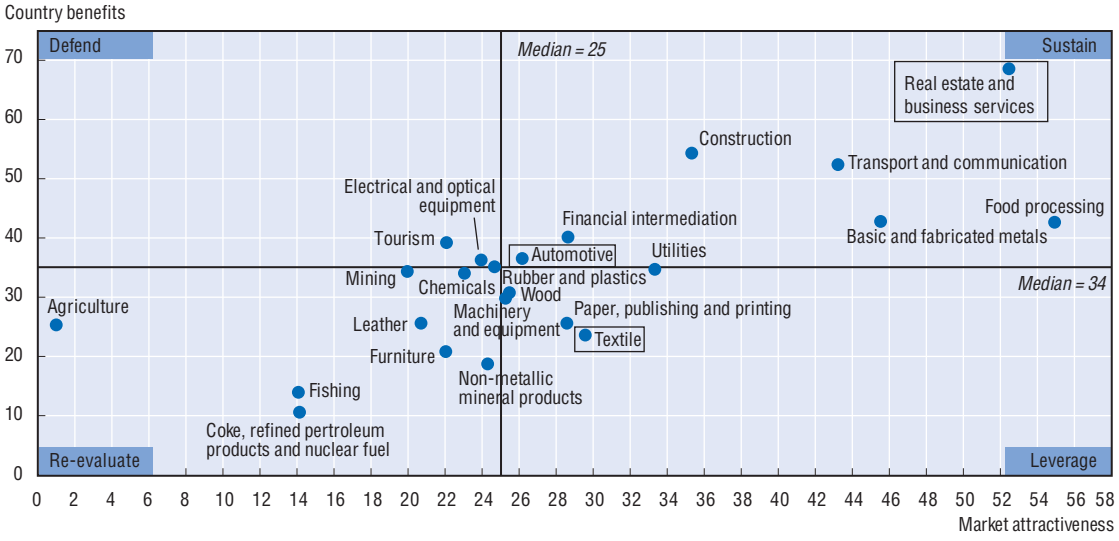
The framework is based on the principle that the sectors in each of four quadrants require different investment promotion strategies (Figure 2).

Sustaining competitiveness is required if both country benefits and market attractiveness are high (*e.g.* in the automotive components, business process outsourcing, and information and communication technology sectors in most of the Western Balkan economies). To sustain their competitiveness, it is essential for these sectors to move up the value chain, as highlighted in the analysis:

"Defending" is required if country benefits are high but relative market attractiveness is low (*e.g.* in the case of historical manufacturing sectors in some of the region's economies). For sectors in this quadrant, the objective is to maintain market share;

"Leveraging" of existing market attractiveness is required in order to improve country benefits (*e.g.* in the textile sector in most of the region's economies);

Figure 0.2. **SPF quantitative analysis output for the Western Balkans region**



"Re-evaluating" a sector is required if both dimensions are low.

The purpose of the SPF is less to prioritise sectors than to adapt strategies relevant to each sector's situation. Based on that approach, sector specific investment promotion strategies were developed. These strategies are outlined in this report.

1.3. Phase 3: Validation of results with stakeholders

Combining the short list of priority sectors identified by Investment Promotion Agencies and regional and industry experts with the results of data collection and quantitative analysis, four sectors were identified for potential focus:

1. Apparel manufacturing.
2. Automotive components manufacturing.
3. Business process outsourcing (BPO).
4. Information and communication technology (ICT).

Given the close links between BPO and ICT sector drivers, in this report the results of the analysis for those two sectors have been merged into one chapter on business process and technology outsourcing (BPTO).

The choice of sectors was presented to the Investment Compact South East Europe Investment Committee (SEE IC) in November 2007, together with the Country Economic Team Leaders and representatives of donor countries and the European Commission, the Stability Pact, the IIWB and the Business Advisory Committee (BAC). Further validation of the appropriateness of the choice of sectors was given by IPA representatives at the OECD Investment Compact Investment Promotion Working Group which met in April 2008.

2. Primary research

The analysis of the competitiveness of these four sectors in the Western Balkans was conducted through three main activities: *i)* a survey of investors and local suppliers in these sectors in the Western Balkans; *ii)* a series of country missions to verify the results of the survey and discuss in more detail the particular barriers faced by those firms; and *iii)* validation of the survey and country mission results with IPA representatives and other stakeholders.

2.1. The Regional Capability Survey (RCS)

The OECD Regional Capability Survey (RCS) focuses on sector specific business and policy constraints experienced in the Western Balkans. It includes both a quantitative and qualitative methodology. The RCS specifically aims at capturing data that:

1. Examines companies' general operational activities.
2. Determines perceptions of obstacles to business growth.
3. Allows calculating productivity.
4. Analyses sector specific issues.
5. Establishes firms' perceptions of key success factors.

The qualitative survey includes two types of data collection methodologies: focus groups, and in-depth interviews during company visits. The qualitative survey was carried out by the OECD using a sample of five to six companies per sector per economy.

The quantitative survey questionnaire was elaborated by the OECD and implemented in the region by Prism Research (www.prismresearch.ba). To secure maximum participation in the survey and ensure data quality, the data has been kept confidential.

The sectors surveyed were apparel manufacturing; automotive components; and business process outsourcing (BPO) and information and communication technology (ICT) (specifically, firms engaged in back office functions, call centre activities and software development).

The survey was carried out in Albania, Bosnia and Herzegovina, Croatia, Kosovo under UNSCR 1244, The former Yugoslav Republic of Macedonia, Montenegro and Serbia. The survey was typically completed by firms' directors, accountants and human resource managers.

2.1.1. Structure of the survey

The RCS questionnaire was organised into five parts.

1. *Part I: General information* asks firms general questions about their business activities, size, ownership and exports.
2. *Part II: Business environment* examines firms' perceptions of the business constraints affecting growth in their sector. The first set of questions is based on similar questions found in the EBRD-World Bank Enterprise Surveys to enable benchmarking.[3] The second set of questions asks the Western Balkan economies to rank policy dimensions according to the OECD Investment Reform Index methodology.[4]
3. *Part III: Company operations and skills gap analysis* is different for manufacturing industries (apparel manufacturing, automotive components) and services industries (BPO and ICT):
   a) For *manufacturing industries,* Part III asks a series of questions to gather more in-depth data on sales, labour costs, etc. for the purpose of calculating productivity and providing information for a financial scenario for apparel and automotive component firms, in order to determine the impact of various policy levers on profitability;
   b) For *services industries*, Part III establishes the extent of skills gaps in BPO and ICT through a series of questions on the mismatch between the types of skills demanded and the availability of those skills in the current workforce.
4. *Part IV: Competitiveness* examines issues that are sector specific, including the implementation of technology relevant to the sector and methods of marketing.
5. *Part V: Customer requirements and key challenges* looks at companies' perceptions of their clients' demands (*e.g.* for expertise in BPO) and the key success factors for surviving in their respective sectors (*e.g.* the introduction of demand forecasting software in textile and apparel manufacturing firms).

The survey consisted of between 29 and 38 questions, depending on the sector (Table 0.1).

Table 0.1. **Number of questions per survey questionnaire**

Sector		Number of questions
Apparel manufacturing		34
Automotive components		38
BPTO	Back office functions	29
	Call centers	33
	Software development	32

2.1.2. Timeline

The survey was conducted in three phases:

Phase I: Prism Research compiled a list of companies in the four sectors, using available company registers and existing databases in the region;

Phase II: This phase included a pilot sampling of three to seven firms in each sector. The purpose of the pilot was to test the feasibility of the questions and the way they were asked. After the pilot study was completed, the results obtained and feedback from firms were used to finalise the questionnaires;

Phase III: This phase involved a full launch of the survey that had been finalised using the results of the pilot survey.

Throughout the implementation period of the survey, the OECD project team conducted focus groups and individual company visits in all of the Western Balkan economies. This exercise was performed to validate the survey results. Focus groups were organised within Chambers of Economy, business clusters and sectoral trade associations for all four sectors in each Western Balkan economy. With the aim of obtaining additional first-hand information, the OECD team visited five to ten companies per sector per economy and conducted interviews with company owners, directors, financial officers, plant managers and plant supervisors.

The combination of quantitative data collection and analysis, focus groups and individual company interviews allowed the OECD to build up a solid understanding of the key success factors, challenges and policy barriers faced by firms in the four sectors covered by the study, at the regional level and at the level of individual Western Balkan economies.

2.1.3. Sampling

The RCS covers a sector specific sampling of firms in the region. It actually consists of four separate surveys, and the sample includes large, medium and small companies. Where only a limited number of companies were surveyed in one of the Western Balkan economies, this reflects the lack of development of that sector in that economy (*e.g.* automotive components in Albania) (Table 0.2). The survey responses have only been taken from a limited sample. Therefore, the findings should be considered indicative rather than comprehensive. However, the data and information that was obtained from the survey are at a quality level that can generally lead to meaningful and relevant conclusions.

Table 0.2. **Number of companies surveyed**

	Apparel manufacturing	Automotive components	BPTO	Total
Albania	30	0	0	30
Bosnia and Herzegovina	31	20	40	91
Croatia	26	7	31	64
Kosovo under UNSCR 1244	34	2	0	36
The Former Yugoslav Republic of Macedonia	30	21	20	71
Montenegro	0	0	20	20
Serbia	31	23	41	95
Total	182	73	152	407

Source: OECD RCS (2008).

2.2. Country missions

After the survey results were collected and analysed by the OECD, a series of country missions were conducted with the dual aims of *i)* validating and augmenting the information obtained through the survey; and *ii)* carrying out consultations with the public and private sectors on the results of sectoral research. All seven of the Western Balkan economies were visited. Firms in each of the four sectors were interviewed, and governments and industry associations were consulted (including Chambers of Economy, trade associations and business clusters).

The general conclusions from the country missions and consultations with representatives of the private sector were that the results of the survey were on target. Interviews with firms and industry associations fleshed out in more detail the barriers and key success factors faced by their sectors.

2.3. Validation of results

Preliminary findings were presented to the governments of the Western Balkan economies during the country missions. In addition, key insights from the survey and country missions and a draft investment promotion strategy were presented to the OECD Investment Compact Investment Promotion Working Group in April 2008. The study results were also presented to the Country Economic Team Leaders, regional IPA representatives, and representatives of international organisations and the donor community at the third meeting of the South East Europe Investment Committee, held in Paris on 22-23 May 2008. The final results were validated by IPA representatives at the launch of the Regional Investment Strategy in Sarajevo in July 2008.

Finally, the OECD Investment Compact has carried out numerous missions to promote work within the SSSC project to external actors and to obtain valuable feedback and suggestions. In particular, members of the Investment Compact team have had the opportunity to examine the results of the study with groups of foreign investors by participating in investment promotion events organised by the IIWB in Paris and Milan, among other events.

3. Secondary research

To identify the market dynamics behind each sector covered by the study, the OECD conducted extensive desk research on the global position and growth of each sector. Sector specific supply and demand factors were analysed, including sector size and growth, customer trends, sector economics and the international competitive environment. The following sources are among those consulted: OECD, EU, World Bank, IMF and UN reports and working papers; market research studies; specialised journals; and press reviews. Workshops were held with industry experts in all of the sectors analysed. In addition, statistics for each sector on output and employment were collected from the national accounts and enterprise surveys of the national offices of statistics of the economies covered in the report. FDI data was gathered from balances of payments compiled by national central banks.

4. The Policy Impact Model (PIM)

The Policy Impact Model (PIM) elaborated by the OECD has two objectives:

1. To evaluate the financial impact of various policy levers on firms.

2. To benchmark the competitiveness of firms against relevant countries.

The model provides the following deliverables:

- Evaluation of a representative firm's return on investment based on changes in key policies, including human capital, taxation, the regulatory burden, infrastructure, financing, macroeconomic instability and trade policy.
- Identification of the specific competitive advantages that the Western Balkan economies and regions have in the selected sectors.
- Classification of policy and business barriers that hamper growth and investment in business.
- Creation of a practical policy tool that governments and investment promotion agencies can use to contribute to the identification of policy and business barriers in numerous manufacturing sectors.

The Policy Impact Model has been used to create a financial statement, based on various assumptions about operations in a hypothetical apparel manufacturing firm (see Chapter 1, Box 7).

Notes

1. Agriculture; fishing; mining; food processing; textile; leather; wood; paper, publishing and printing; coke, petroleum, fuel; chemicals; rubber and plastics; other mineral products; basic and fabricated metals; machinery and equipment; electrical and optical equipment; automotive; furniture; utilities; construction; tourism; transport and communication; financial intermediation; real estate and business services.
2. Sectors were identified at the NACE (Classification of Economic Activities in the European Community) one-digit level. However, as the manufacturing sector is too broad to allow a detailed enough analysis, manufacturing industries were identified at the NACE two-digit level.
3. The EBRD-World Bank Business Environment and Enterprise Performance Survey (BEEPS) was a survey of managers and owners of more than 20 000 firms across 26 countries of Central and Eastern Europe, the former Soviet Union, and Turkey. It was carried out in three rounds: 1999, 2002 and 2005. Furthermore, to set a benchmark for the transition countries, a survey of comparator countries was conducted in 2004-05 in two rounds. For more information, see *http://go.worldbank.org/RQQXYJ6210*.
4. The Investment Reform Index (IRI) is a practical tool developed by the OECD Investment Compact to measure and communicates on progress made by South East European countries in improving their investment climate. Structured around the OECD Policy Framework for Investment, which incorporates good practices from OECD countries, the IRI measures progress in eight policy fields: investment policy; investment promotion and facilitation; tax policy; anti-corruption and business integrity; competition policy; trade policy; regulatory reform and human capital. For more information, see *www.investmentcompact.org*.

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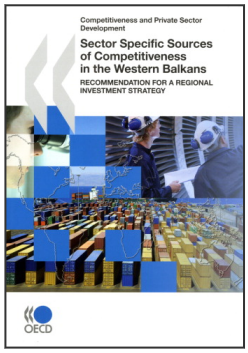

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